

# **Evaluation of TV viewing for the 2014 Tour de France**

**An international perspective**

**Prof. Dr. Daam Van Reeth**  
**KU Leuven, campus Brussel, Belgium**  
**([daam.vanreeth@kuleuven.be](mailto:daam.vanreeth@kuleuven.be))**



# OBSERVATIONS

# MAIN CONCLUSIONS ON TV VIEWING FOR THE 2014 TOUR DE FRANCE (1)

- Tv interest in the Tour de France was significantly lower in 2014. We notice an overall drop of 7% in tv ratings for the 6 countries for which historical information since 2010 has been collected (Belgium, France, the Netherlands, the UK, the US and Australia).
- Compared to last year, Tour de France tv audiences have slightly increased in Flanders and, thanks to le Grand Départ, also in the UK, while they remained stable in the US and in Wallonia and decreased 5 to 15% in the Netherlands, in Australia and, surprisingly, in France.
- Compared to the historical peak of 2011, the overall tv audience is now 10% lower. But the negative evolution is masked a bit by the dominant share of the French audience. Outside of France, Tour de France tv audiences in 2014 are actually a worrying 22% below the 2011 level.
- No country reached a historical peak in tv audience this year while in Australia, the Netherlands and in Wallonia the lowest tv audiences for the Tour de France in 5 years were recorded.

# MAIN CONCLUSIONS ON TV VIEWING FOR THE 2014 TOUR DE FRANCE (2)

- Based on detailed individual stage information from 8 countries, we find that stage 9 in the Vosges (Gérardmer-Mulhouse) was this year's best watched stage with a global audience of 11,2 million viewers in these countries.
- Stage 14 (Grenoble-Risoul), a mountain stage in the Alpes, comes second with an estimated audience of 10,8 million viewers and a second stage in the Vosges region completes the podium: stage 10 (Mulhouse-La Planche des Belles Filles) was watched by 10,4 million persons.
- Tv audiences for Flemish and Dutch Tour talkshows decreased significantly compared to last year and are now at a historically low level.
- **In general, we conclude that the Tour de France (and since the Tour is its hallmark event, professional road cycling in general) faces a serious problem of decreasing tv interest. Although the abandon of Froome and Contador and the dominance of Nibali certainly played an important role, we can not ignore that tv audiences for the tour de France have decreased in most countries for a number of years in a row now and are at historically low levels in some places. It will be interesting to see if ASO can reverse this trend in the coming years to preserve the status of the tour de France as one of the world's top tv sports events.**

# COUNTRY-SPECIFIC INFORMATION (1)

- In Australia on average only 182.000 viewers watched the Tour de France, which is 43% below the peak score of 2011. The cobblestones stage was the best watched stage in Australia.
- In Flanders tv audiences were up 4% compared to last year's low of 448.000 viewers. The number of viewers nevertheless remains 20% below the peak audience of 2011. Stage 9 (Gérardmer-Mulhouse) was the best watched stage in Flanders only marginally surpassing the cobblestones stage that departed in the Flemish city of Ypres.
- Despite the fact that for the first time in 30 years two French riders ended up on the final Tour podium, tv audiences for broadcasts before 15h on France 3 (- 16%) as well as for broadcasts after 15h on France 2 (- 5%) were below last year's historical top scores. With 5,22 million viewers, Stage 9 (Gérardmer-Mulhouse) was the best watched stage on France 2 followed at a close distance by stage 10 ridden on the French national holiday (5,12 million viewers). On France 3, stage 14 (Grenoble-Risoul) recorded the biggest tv audience (3,25 million viewers).
- In the Netherlands, tv interest in the Tour de France decreased for the third year in a row and is now 33% below the peak of 2011. The excellent performance of Dutch riders (3 riders in the top 15 and 2 riders in the top 10 for the first time in 25 years) did not result in higher tv audiences. Because of the last stage only the final part was broadcast in the Netherlands, tv ratings for this stage are artificially high making it the most watched stage in the Netherlands. From the other stages, also in the Netherlands stage 9 was the most popular one with over 1 million viewers.

# COUNTRY-SPECIFIC INFORMATION (2)

- In the UK tv audiences are up 3% compared to last year but still 11% below the peak of 2012. Because the highest tv audiences were recorded in the first week of the Tour, the small increase in tv audiences can be contributed entirely to Le Grand Départ in England. The most popular stage in the UK was, surprisingly, stage 6 (Arras-Reims). It should be noted though that UK data are based on the daily 'highlights' show at 7p.m. We suspect that during the broadcast of stage 6, the abandon of Christopher Froome in the previous stage 5 was discussed in length boosting the tv audience for this otherwise 'ordinary' flat stage.
- In the US tv audiences are remarkably stable at about 290.000 viewers for the third year in a row. This number is 37% below the 2010 level and is only a mere 15% of the total number of viewers at the end of the reign of Lance Armstrong in 2004-2005 when over 1,5 million Americans watched the Tour de France.
- In Wallonia the number of Tour de France viewers remained stable compared to 2013, but it is 33% below the peak of 2011. Just like in the Northern part of Belgium, also in Wallonia stage 9 was the best watched stage.
- For the first time, we were able to record stage-specific information from Denmark. On average 259.000 people watched the Tour de France. Also in Denmark, stage 9 was the best watched stage but with an audience of 476.000 viewers, it is a staggering 84% above the average audience which is much more than in any other country where the most popular stages record 30 to 50% more tv viewers than an average stage.

# COUNTRY-SPECIFIC INFORMATION (3)

- Although below the historical peaks of over 1 million viewers in 2010-2011 a solid tv audience of 928.000 was recorded in Italy. Interest grew steadily along with the success of Vincenzo Nibali with high tv ratings in the last week of the Tour. Surprisingly stage 20, a time trial stage that not made it into the overall top 10 of best watched stages, was the most popular stage in Italy.
- In Spain over 1,2 million viewers on average watched the Tour de France, which is close to the peak audience of 2012. It should be noted, however, that Spanish tv only starts its broadcasts at 16h every day and that, for an international comparison, the Spanish viewing figures are thus artificially inflated, especially compared to countries like France, Belgium, the Netherlands and Denmark where stages are usually shown for at least 3 to 4 hours. Total broadcast time for the Tour de France in Spain was 35 hours only, which is less than half of the 80 to 90 hours of broadcast time in the aforementioned countries. Stage 14 (Grenoble-Risoul) earned the highest tv ratings in Spain.
- Although the overall number of Dutch tv viewers for the Tour de France decreases, the number of Dutch tv viewers preferring Flemish tv broadcasts over domestic broadcasts increased by no less than 26%. Remark that especially older Dutch people prefer Flemish television: the average Dutch tv viewer for Flemish tv is 59 years old while the average age of the Dutch tv viewers for domestic broadcasts of the Tour de France is only 56 years. Within this group of Dutch cycling fans, the cobblestones stage was the most popular one.

# EVALUATION OF THE PREDICTION OF TV AUDIENCES IN FLANDERS

- The model predicting Tour de France tv audiences in Flanders performed worse than in previous years. While from 2011 to 2013 the prediction of the average TV audience was accurate within a 5% margin, the 2014 prediction was an 11% overestimation. The peak audience model performed even worse and overestimated the peak number of viewers per stage by 20%.
- The model predicts very well tv audiences in the first half of the Tour but becomes inaccurate afterwards. This is clear from stage 10 on for the peak audience and from stage 16 on for the average audience. The dominance of Nibali and the resulting lack of suspense is largely responsible for this result, elements that can not be taken into account in a model with prior assumptions on such variables. Since peak audiences, much more than average audiences, are determined by occasional viewers it can be concluded that general interest in the tour de France already started to fade halfway the Tour de France (with the exit of Contador) and that in the final week also more devoted cycling fans dropped out the moment the dominance of Nibali became too overwhelming.
- The model was re-estimated after the Tour had finished with the actual values for the variables that could not be determined in advance, i.e. the suspense variables, the weather variables and the patriotism variables. With the real values of all the variables now available, the model tells there should have been an average number of viewers of 490.000 (5% overestimation only) and a peak audience of 818.000 (10% overestimation), which is indeed much more accurate than the prediction based on prior assumptions. This shows the model remains reliable when it comes to explaining tv audiences for the tour de France and that deviations to the model are largely the result of unforeseeable elements like the presence or lack of suspense.



# **TABLES, FIGURES & DATA**

# AVERAGE VIEWING PER TOUR STAGE: international comparison

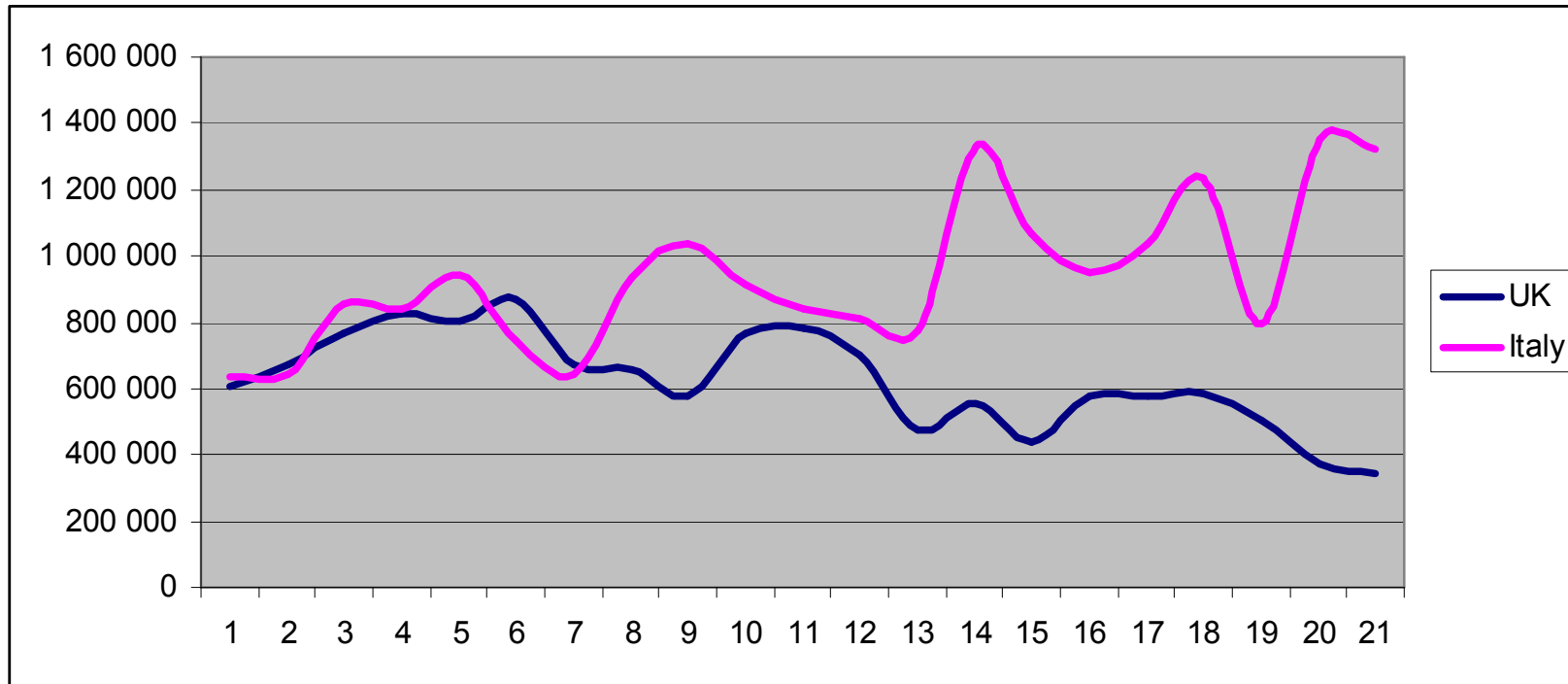
<i>Regions with complete information</i>	2010	2011	2012	2013	2014	% change vs. 2013	% change vs. peak
Australia	209 000	<u>318 000</u>	256 000	204 000	182 000	-11%	-43%
Flanders (Belgium North)	571 000	<u>586 000</u>	522 000	448 000	467 000	4%	-20%
France (France 2, after 15h)	3 286 000	3 760 000	3 400 000	<u>3 980 000</u>	3 800 000	-5%	-5%
France (France 3, before 15h)	1 900 000	2 700 000	2 260 000	<u>2 850 000</u>	2 400 000	-16%	-16%
The Netherlands (for Dutch tv)	771 000	<u>1 020 000</u>	779 000	745 000	680 000	-9%	-33%
United Kingdom	438 000	563 000	<u>705 000</u>	606 000	625 000	3%	-11%
United States	<u>456 000</u>	334 000	290 000	287 000	288 000	0%	-37%
Wallonia (Belgium South)	231 000	<u>294 000</u>	268 000	200 000	198 000	-1%	-33%
<b>Total</b>	<b>7 862 000</b>	<b><u>9 575 000</u></b>	<b>8 480 000</b>	<b>9 320 000</b>	<b>8 640 000</b>	<b>-7%</b>	<b>-10%</b>
<b>without France</b>	<b>2 676 000</b>	<b><u>3 115 000</u></b>	<b>2 820 000</b>	<b>2 490 000</b>	<b>2 440 000</b>	<b>-2%</b>	<b>-22%</b>
<i>Regions with missing information for some years</i>	2010	2011	2012	2013	2014	% change vs. 2013	
Denmark	n.a.	n.a.	n.a.	n.a.	259 000		
Italy	<u>1 090 000</u>	1 027 000	n.a.	n.a.	938 000		
Spain	769 000	795 000	<u>1 262 000</u>	n.a.	1 218 000		
The Netherlands (for Flemish tv)	n.a.	90 000	n.a.	94 000	<u>118 000</u>	26%	

(Peak scores for a region are underscored and given a blue background.)

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## AVERAGE VIEWING PER TOUR STAGE: the UK versus Italy



A comparison of the UK and Italian tv ratings per stage shows a remarkable result. In the first week, tv ratings in both countries closely resemble each other. From the first mountain stages on, with the abandon of Froome and the dominance of Nibali, tv ratings in both countries start to diverge importantly.

# 10 BEST WATCHED STAGES: International total

(based on detailed information from Belgium North & South, France, the Netherlands, Denmark, Italy, Spain, Australia, UK)

<i>Stage</i>	<i>Viewers (in million)</i>
<b>Stage 09: Gérardmer – Mulhouse</b>	<b>11,2</b>
Stage 14: Grenoble – Risoul	10,8
Stage 10: Mulhouse – La Planche des Belles Filles	10,4
Stage 18: Pau - Hautacam	9,9
Stage 17: Saint-Gaudens – Pla d'Adet	9,2
Stage 08: Tomblaine – Gérardmer/La Mauselaine	9,1
Stage 15: Tallard – Nîmes	9,0
Stage 13: Saint-Etienne – Chamrousse	9,0
Stage 16: Carcassonne – Bagnères-de-Luchon	8,9
Stage 05: leper (Bel) - Arenberg/Porte du Hainaut	8,8

## BEST WATCHED STAGE: international comparison

<i>Region</i>	<i>Stage</i>	<i>Viewers</i>
Australia	Stage 05: Ypres (Bel) - Arenberg/Porte du Hainaut	<b>232.000</b>
Denmark	Stage 09: Gérardmer – Mulhouse	<b>476.021</b>
Flanders (Belgium North)	Stage 09: Gérardmer – Mulhouse	<b>717.778</b>
France 2 (after 15h)	Stage 09: Gérardmer – Mulhouse	<b>5.220.000</b>
France 3 (before 15h)	Stage 14: Grenoble – Risoul	<b>3.250.000</b>
Italy	Stage 20: Bergerac – Périgueux	<b>1.350.000</b>
Spain	Stage 14: Grenoble – Risoul	<b>1.622.000</b>
The Netherlands (viewers for Dutch tv)	Stage 21: Evry – Paris/Champs-Élysées	<b>1.216.000</b>
The Netherlands (viewers for Flemish tv)	Stage 05: Ypres (Bel) - Arenberg/Porte du Hainaut	<b>171.000</b>
United Kingdom	Stage 06: Arras – Reims	<b>867.000</b>
Wallonia (Belgium South)	Stage 09: Gérardmer – Mulhouse	<b>301.500</b>

# AVERAGE VIEWING TOUR TALKSHOWS: international comparison

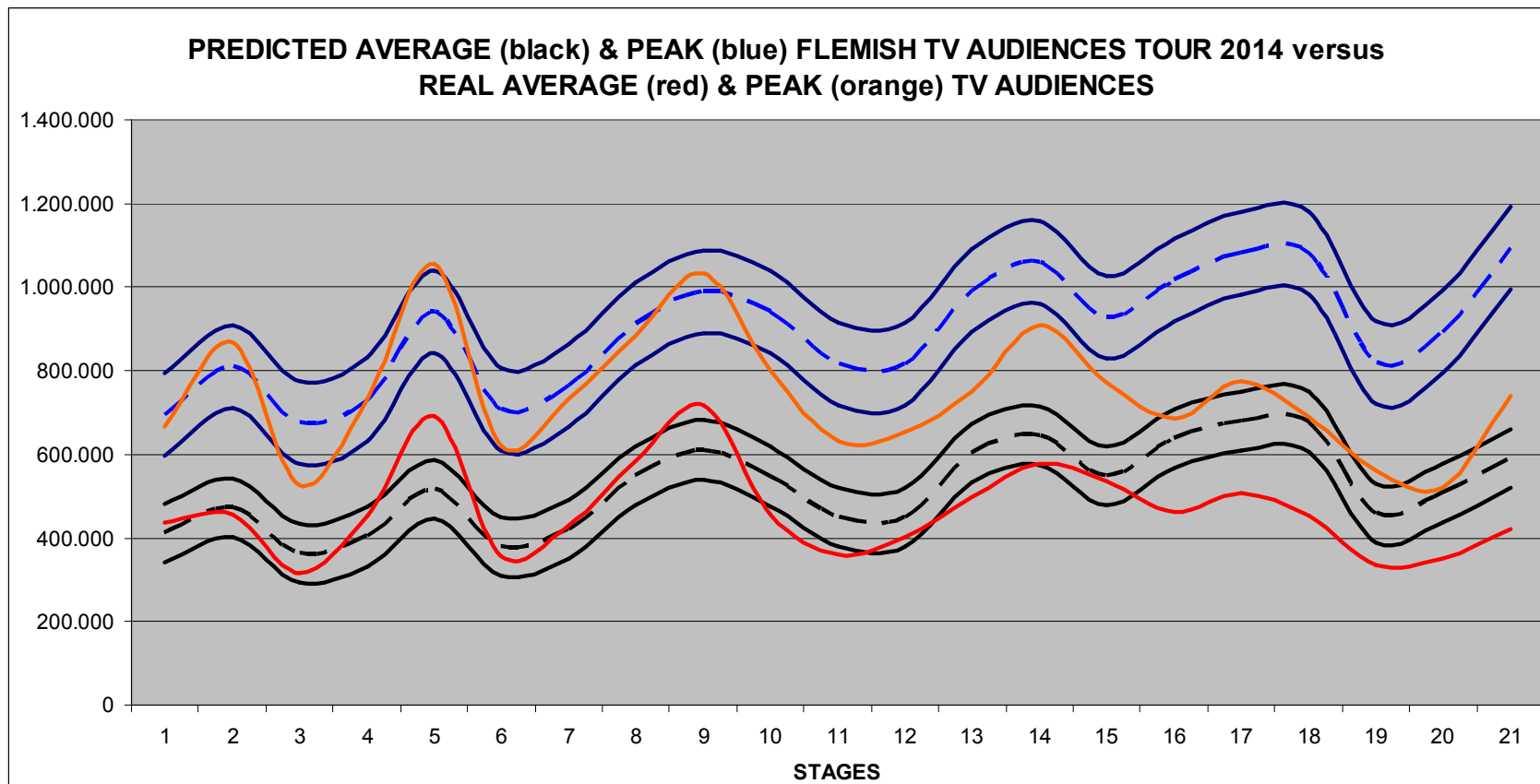
Country	Talkshow	2011	2012	2013	2014
France	Village Départ (France 3)	/	+/- 1.000.000	1.234.000	<b>+/- 1.000.000</b>
France	L'après Tour (France 2)	/	+/- 2.000.000	1.840.000	<b>+/- 2.000.000</b>
Flanders	Vive le Vélo (Eén)	770.000	752.000	774.000	<b>613.000 (- 21%)</b>
The Netherlands	De Avondetappe (Nederland Eén)	1.076.000	877.000	953.000	<b>917.000 (- 4%)</b>
The Netherlands	Tour du Jour (RTL 7)	482.000	591.000	424.000	<b>314.000 (- 26%)</b>

Tv interest in Flemish and Dutch Tour talkshows decreased from 4% (Holland, Avondetappe) to 26% (Holland, Tour du Jour). The Flemish talkshow Vive le Vélo recorded the lowest tv audiences since 2009 and a loss of 21% compared to 2013. Together, the three Flemish & Dutch talkshows have lost close to 500,000 viewers since 2011, or 21%. No detailed information on French talkshows was available.

## EVALUATION OF THE 2014 VIEWERSHIP PREDICTION FOR FLANDERS: MODEL WITH PRIOR ASSUMPTIONS FOR UNCERTAIN VARIABLES (BEFORE)

- Average viewing (red line): 467.000 average per stage versus prediction of 520.000 (11% overestimation).
- Peak viewing (orange line): 743.000 average per stage versus prediction of 893.000 (20% overestimation).

(Remark: upper and lower boundaries of predicted values correspond with differences of 1 standard deviation)



## EVALUATION OF THE 2014 VIEWERSHIP PREDICTION FOR FLANDERS: MODEL WITH REAL VALUE FOR UNCERTAIN VARIABLES (AFTER)

- Average viewing (red line): 467.000 average per stage versus prediction of 490.000 (5% overestimation).
- Peak viewing (orange line): 743.000 average per stage versus prediction of 818.000 (10% overestimation).

(Remark: upper and lower boundaries of predicted values correspond with differences of 1 standard deviation)

